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Commercial Analysis of the Scallop Fishery in Quebec, 1991

Economic and Commercial Analysis Report n° 121

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Commercial Analysis of the Scallop Fishery in Quebec, 1991

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La flotte du Québec a connu des débarquements de pétoncle inférieurs en 1991 par rapport à 1990. Avec moins de ressource disponible, les exportations québécoises ont diminué mais en conservant les États-Unis comme principal client. En ce qui a trait aux importations québécoises, notre voisin du sud continue de faire sentir sa présence sur le marché québécois malgré qu'elles soient à la baisse. Du côté américain, des débarquements moins importants et des importations à la baisse ont fait diminuer la disponibilité du pétoncle géant sur ce marché; les prix de 1991 sont donc demeurés au même niveau que 1990. La France, dont le marché n'est pas à négliger vu son importance, pourrait constituer une option intéressante pour le pétoncle québécois.

EXECUTIVE SUMMARY

Québec's fleet recorded lower scallop landings in 1991 compared to 1990. With the reduction in resource availability, Québec scallop exports declined, but the United States remained the principal foreign buyer. At the same time, our southern neighbour continued to supply scallops to the Québec market, although Québec imported less than in 1990. In the United States, lower giant scallop landings and imports resulted in reduced supply on the US market. Prices in 1991 stayed at the same level as in 1990. France, with its strong consumption level, is emerging as a promising market outlet for Québec scallops.

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INTRODUCTION

This report is intended to inform those involved in the Québec fishing industry about the situation of the scallop fishery in 1991.

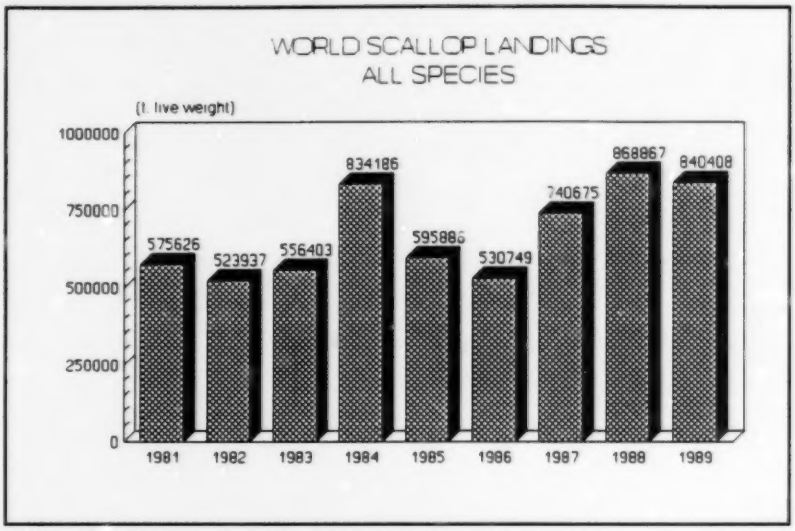
The United States is the major player to be watched with regard to developments in the scallop market. Indeed, the bulk of Québec and Canadian exports go to the United States. It is also the principal supplier of scallops to the Québec market. France is a market that deserves attention as well, given its increasing share of Canadian exports and its potential as a market outlet for Québec scallops.

This commercial analysis provides a summary of overall performance in 1991. This is followed by a section on the US market and a brief overview of the French market. The catch sector is not analysed owing to a lack of data on the financial performance of the North Shore scallop-fishing fleet. Since this fleet accounts for the greater part (73%) of Québec landings, describing the primary sector without including this fleet would be difficult.

We would like to thank the Statistics Division in Québec, whose kind co-operation helped make this report possible.

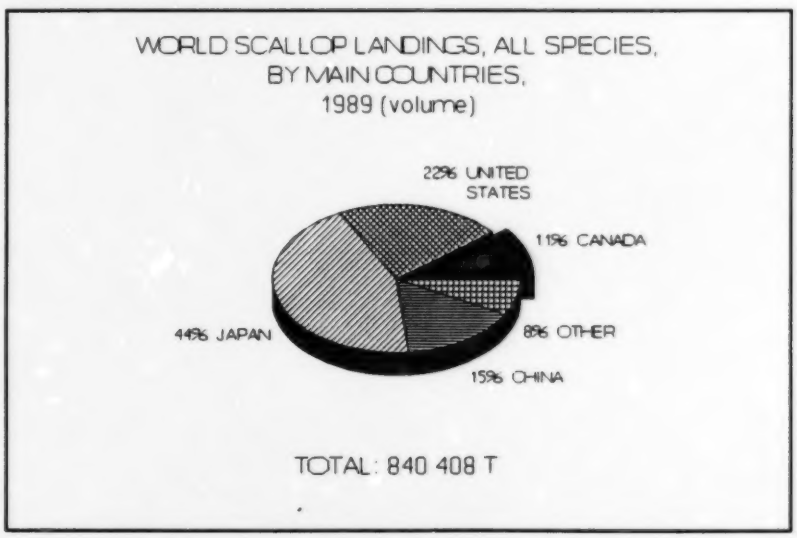
1.0 SUPPLY

Chart 1



In 1989, the most recent year for which world statistics exist, more than 840,000 tonnes of scallops of all species were landed. The trend in world supply is difficult to pinpoint, given the intensive harvesting of some stocks and the rapid depletion of others. The expansion of aquaculture operations in Japan and China and the strong Canadian and US fishing effort off Georges Bank have contributed to an increase in world landings over the past few years. However, reduced landings of calico scallops off the eastern coast of Florida and Peru, Indonesia and Australia slowed the expansion of total landed volume between 1986 and 1989.

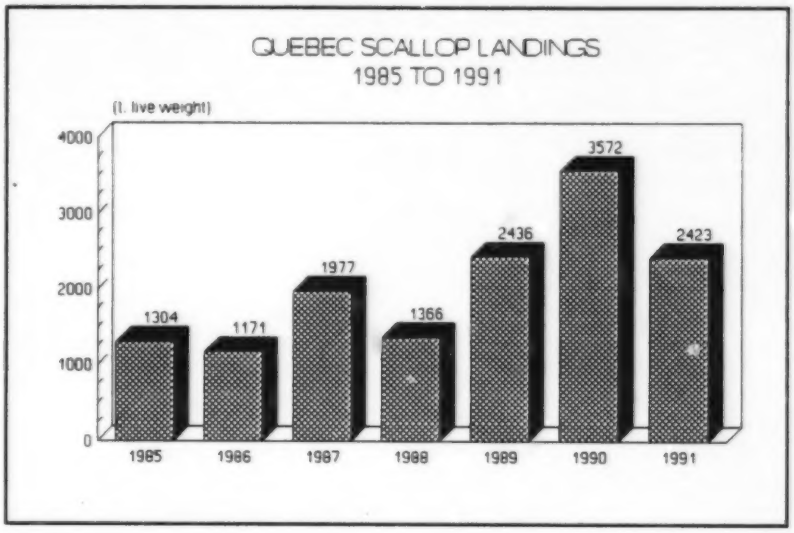
Chart 2



Japan remained in first place, with 44% of total world landings. Note that nearly half of the Japanese output came from aquaculture. The United States ranked second among producing countries, with 22% of the world catch. Canada's share of world landings was 11%. China is a significant newcomer in

the world scallop market. With 15% of world landings, it ranked third among the world's scallop producers, followed closely by Canada. China's farm-raised *Pecten yessoensis* is a species to be reckoned with: aquaculture production has risen from 2,000 tonnes in 1983 to a level currently exceeding 120,000 tonnes.

Chart 3

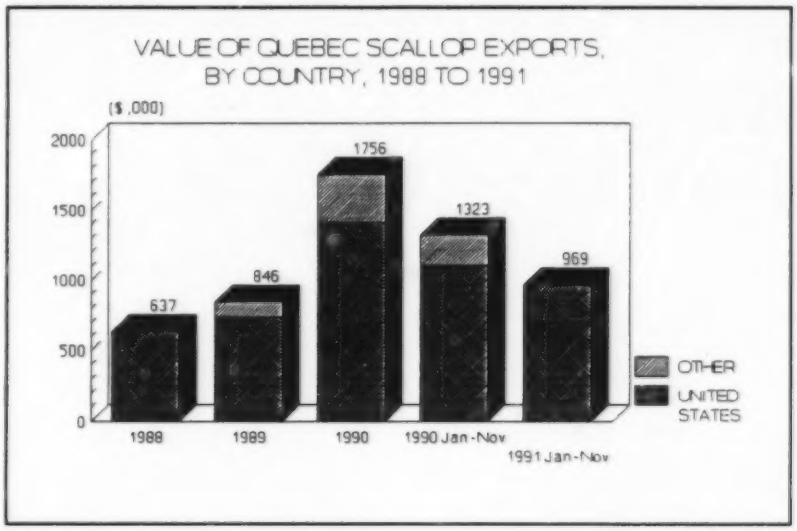


Québec landings fell by a substantial 32% between 1990 and 1991. With a landed volume of 2,423 tonnes in 1991, Québec nonetheless recorded results comparable to those of 1989. In view of Québec's small catch, which accounts for only 0.3% of world landings, it has no influence on the main markets.

2.0 DEMAND FOR QUÉBEC SCALLOPS

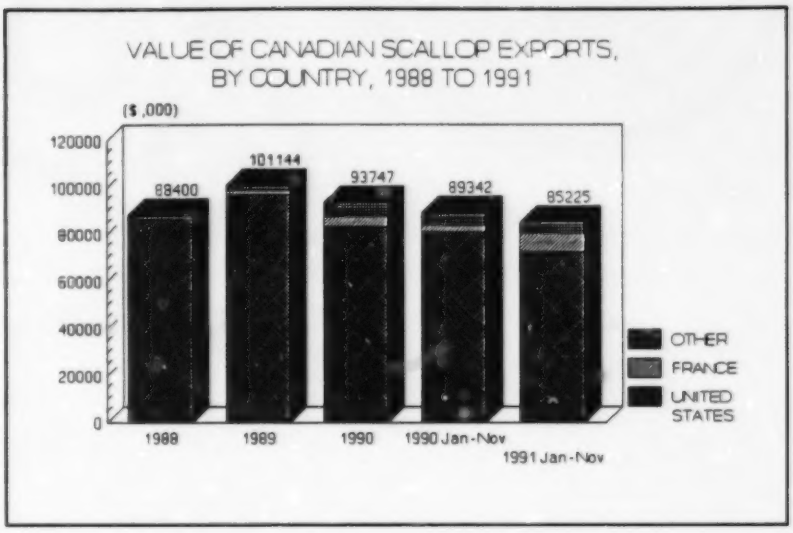
Although Québec has little influence on the equilibrium of the world market, it is interesting to look at its export markets to understand the dynamics and the repercussions on the Québec scallop fishery.

Chart 4



Slightly more than 40% of Québec scallop landings, in value, was exported. In the first 11 months of 1991, exports dropped 26% in value compared to the same period in 1990. This situation is attributable primarily to the decline in landed volume that occurred during the year. In 1991, all of Québec's exports went to the United States, compared to slightly over 80% in 1990, when the United Kingdom took nearly 20% of total exports.

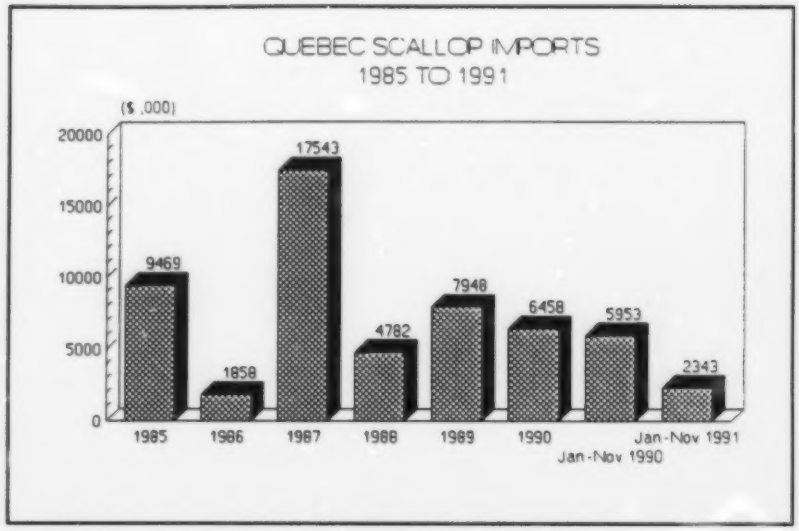
Chart 5



It is interesting to draw a parallel with Canadian scallop exports. In the first 11 months of 1991, Canadian exports nudged down slightly, showing a decrease of 4% in value over the same period in 1990. The United States lost some ground as Canada's main customer between 1988 and 1991 when its share of Canadian exports (in value) slipped from 98% to 85%. During the same period in 1988, France bought only 1.3% of Canadian exports. In contrast, its 1991 purchases accounted for 9% of the total value of Canadian exports. France is therefore a market to keep an eye on.

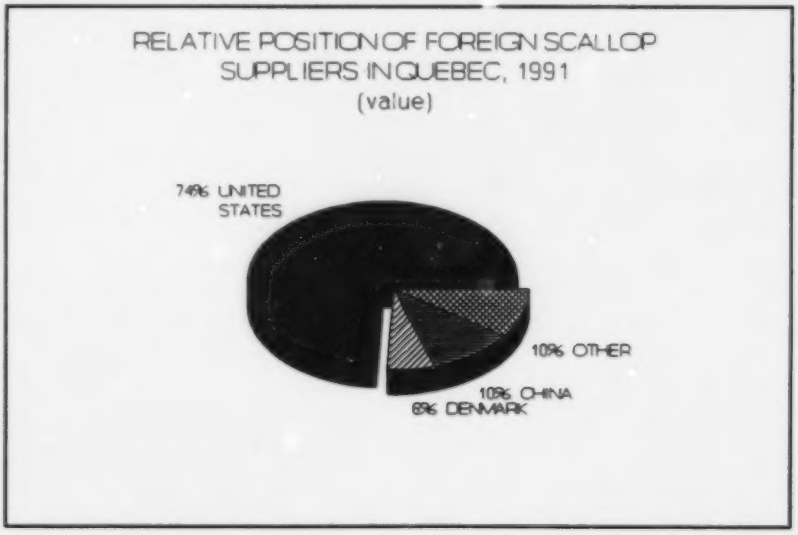
It is surprising to note that although Canada exports scallops to France, Québec does not have a finger in this pie. The explanation for this is partly that Québec does not have access to extensive scallop beds, as is the case with Nova Scotia. Hence, it is harder to build up a sufficient quantity of scallops at any given time to warrant a shipment to France. It is easier for Québec producers to export scallops to the United States in shipments comprising other marine species as well.

Chart 6



On the domestic market, Québec scallops have to compete with large quantities of imports every year. In the first 11 months of 1991, 367 tonnes of scallops, valued at $2.3 million, were imported to Québec. While this volume represents a drop of 60% from the 1990 level, it is equal to Québec's total production. In 1990, total imports were one and a half times greater than domestic production. Québec scallop producers therefore have to contend with foreign competitors on the Québec market.

Chart 7



In 1991, the United States topped the list of scallop importers in Québec, with 74% of the total value of imports. China, a market that deserves attention since it is gaining ground, accounted for 10% of imports. Denmark followed in third place, with 6% of the value of imports. Here again, the United States is a key player to watch.

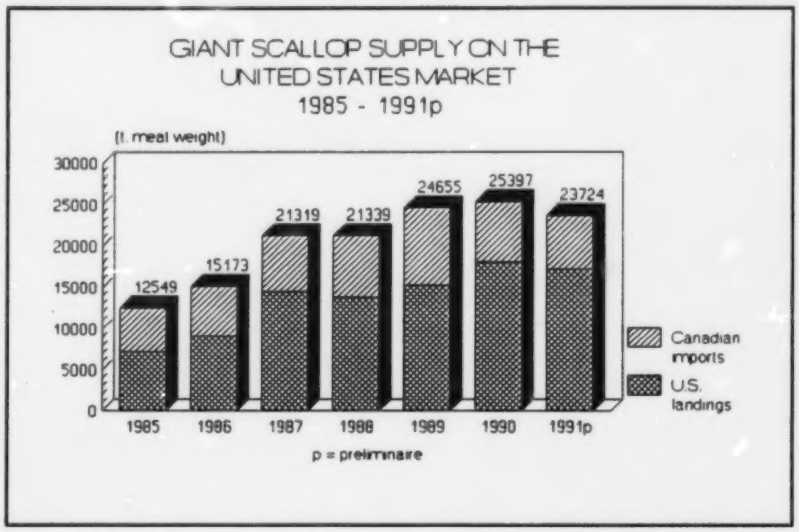
Why, however, did Québec export 40% of its scallop crop if it knew that during the year it would import a quantity equal to or greater than its total production? The first reason, which is touched on above, has to do with the fact that Québec producers already have a network of contacts with the United States and can combine shipments of scallops with other marine species. Secondly, demand for scallops in Québec appears to be fairly stable throughout the year, judging from import levels. Exports, however, are concentrated mainly during the fishing season, from May to October. Québec importers therefore probably have connections abroad which enable them to guarantee a year-round supply.

In summary, in the Québec scallop fishery, the United States is a major player both as a market for Québec exports and as a supplier of scallops to the domestic market. US market conditions therefore have a crucial impact on the Québec fishery. The French market is of special interest since French people are fond of scallops (coquilles St-Jacques) and it is emerging as a growth market for Canadian exports.

3.0 THE U.S. MARKET

Since the giant scallop makes up the bulk of Québec and Canadian landings as a whole and since it is the biggest seller on the US market, the analysis below is limited to that particular species. The giant scallop supply on the U.S. market is composed mainly of Canadian imports and scallops landed off the eastern coast of the United States.

Chart 8



In 1991, the giant scallop supply on the US market totalled 23,724 tonnes, down 6% from 1990. A slight decline in domestic landings (1,000 tonnes), combined with a 700-tonne decrease in Canadian imports, caused this reduced availability. Nonetheless, the supply is currently 90% higher than in 1985.

Chart 9

US inventories of giant scallops were in a free fall during the last six months of 1991, a situation which caused prices to strengthen on the US market at the end of the year. This illustrates the close relationship between inventory levels and prices. As a rule, prices tend to rise as inventories decline.

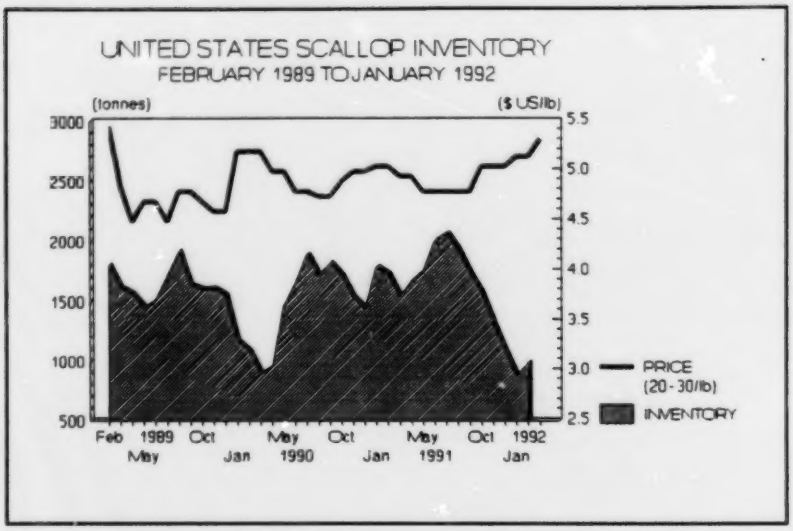
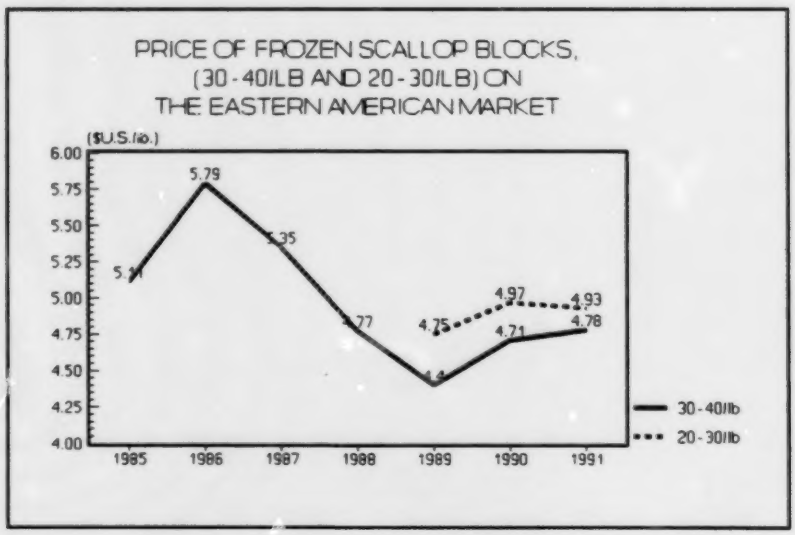


Chart 10

In 1991, the average price on the US market was stable, in contrast with the situation in 1990. The price of frozen scallops (30-40/lb) rose from US $4.71/lb to US $4.78/lb between 1990 and 1991. In the same period, the price of the 20-30/lb format slipped from US $4.97 to US $4.93. Hence, prices have stabilized, ending the downward trend that began in 1986. In spite of this stability, Canadian producers had to contend with a higher Canadian dollar in 1991. Their earnings from exports to the US market in 1991 were about 3% lower than in 1990 even though the price was fairly stable.



4.0 THE FRENCH MARKET

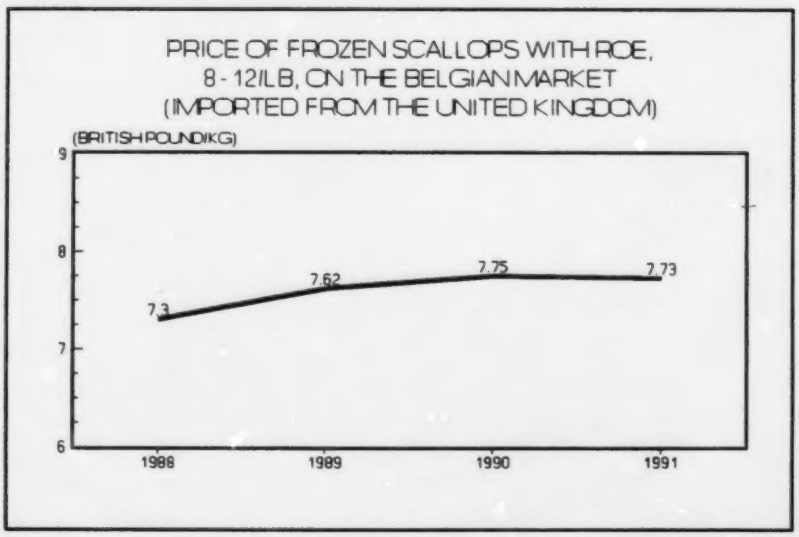
France appears to hold promise as a market outlet for Québec scallops. Some of the Atlantic provinces already export scallops to this country. Canadian exports to France rose from 100 tonnes of meat in 1988 to 568 tonnes in 1991.

The main reason for envisaging an increase in scallop exports to France is that Japan, traditionally its main supplier, has been barred from the French market since the spring of 1990 owing to sanitary considerations.

The French scallop market, which centres on "coquilles St Jacques", is vast, with average annual imports amounting to over 9,500 tonnes of meat. The French prefer scallops with the gonads (roe) still attached to the muscle.

In this analysis, we have used the price of scallops sold on the Belgian market owing to the lack of sufficient historical data on prices in France. Moreover, our choice is justified by the similarity in scallop prices in France and Belgium.

Chart 11



The average annual price of individually frozen scallops with roe (IQF) sold on the Belgian market has been fairly stable over the past four years. Indeed, the price rose a mere 6% between 1988 and 1991, from £7.30/kg to £7.73/kg. In 1991, a Canadian producer could thus expect to earn about CAN $15.70/kg for scallops on the Belgian market. Note, however, that the 8% EEC (European Economic Community) tariff on this

product must be factored in. Depending on the circumstances, it may be profitable to export scallops to France.

5.0 OUTLOOK FOR 1991

In 1992, it will be important to see whether US officials move to rein in the fishing effort of the northeastern US fleet. Legislation for that purpose could cause US landings to decline and, consequently, reduce the supply of scallops on the US market. This would boost demand for Québec scallops both in the United States and at home.

The domestic market remains a promising option, and demand for scallops is definitely strong as is evident from the high level of annual imports. France is also a potential outlet for Québec scallops, given the high demand for the product.

APPENDICES

TABLE 1: World scallop landigns, 1981-1989.

YEAR	LANDINGS (metric tons)
1981	575 626
1982	523 937
1983	556 403
1984	834 186
1985	595 886
1986	530 749
1987	740 675
1988	868 867
1989	840 408

TABLE 2: Main scallop producing countries, 1986-1989 (metric tons).

COUNTRY	1986	1987	1988	1989
JAPAN	249 597	297 765	341 618	369 373
UNITED STATES	97 617	210 778	240 862	184 747
CANADA	56 900	73 813	77 750	91 553
ICELAND	16 429	13 272	10 058	10 772
CHINA	23 686	43 640	121 991	129 461
OTHER	86 520	101 407	76 588	54 502
TOTAL	**530 749**	**740 675**	**868 867**	**840 408**

Source: Food and Agriculture Organization (FAO), United Nations, Fishing Statistics, Vol. 68, 1989.

TABLE 3: Québec scallop landings, 1985-1991, in metric tons, live weight

YEAR	1985	1986	1987	1988	1989	1990	1991
METRIC TONS	1 304	1 171	1 977	1 366	2 436	3 572	2 423

Source: Fisheries and Oceans Canada, Québec Region

TABLE 4: Québec scallop exports, 1988-1991.

	UNITED STATES		OTHER		TOTAL	
Year	Quantity (kg)	Value ($)	Quantity (kg)	Value ($)	Quantity (kg)	Valeur ($)
1988	71 456	634 186	299	3 322	71 755	637 508
1989	95 243	740 458	13 679	105 550	108 922	846 008
1990	127 094	1 417 385	40 899	339 235	167 993	1 756 620
jan.-nov. 1990	102 105	1 110 376	17 859	212 601	119 964	1 322 977
jan.-nov. 1991	85 779	966 021	690	2 724	86 469	968 745

Source: Statistics Canada

TABLE 5: Canadian scallop exports, 1988-1991.

YEAR	UNITED STATES		FRANCE		OTHER		TOTAL	
	Quant. (t)	Value (000$)	Quant. (t)	Value ($)	Quant. (t)	Value (000$)	Quant. (t)	Value (000$)
1988	7 573	86 490	100	1 209	58	701	7 731	88 400
1989	9 357	97 338	125	1 693	213	2 113	9 695	101 144
1990	7 265	83 328	364	4 344	592	6 075	8 221	93 747
jan.-nov. 1990	7 060	80 817	292	3 323	513	5 202	7 865	89 342
jan.-nov. 1991	6 318	72 629	568	7 673	450	4 923	7 336	85 226

Source: Statistics Canada

TABLE 6: Québec scallop imports, 1985-1991.

Year	Quantity (kg)	Value ($)
1985	969 400	9 469 000
1986	158 700	1 858 413
1987	2 106 000	17 542 573
1988	587 612	4 782 721
1989	921 194	7 948 819
1990	891 332	6 458 033
jan.-nov. 1990	815 791	5 953 747
jan.-nov. 1991	367 440	2 343 523

Source: Statistics Canada

TABLE 7: Québec scallop imports, by country, 1990-1991.

	1990		1991	
Country	Quantity (kg)	Value ($)	Quantity (kg)	Value ($)
United States	703 885	4 757 488	296 803	1 740 398
China	15 931	115 577	32 779	238 558
Denmark	------	------	12 510	130 154
Japan	102 371	1 028 012	1 180	6 488
Norway	25 928	216 108	------	------
Other	43 217	340 848	24 168	227 925
TOTAL	**891 332**	**6 458 033**	**367 440**	**2 343 523**

Source: Statistics Canada

TABLE 8: Giant scallop supply on the U.S. market, 1985-1991p, metric tons, meat weight.

Year	U.S. landings	Canadian exports to the United States	Total
1985	7 195	5 354	**12 549**
1986	9 087	6 086	**15 173**
1987	14 563	6 756	**21 319**
1988	13 890	7 449	**21 339**
1989	15 344	9 311	**24 655**
1990	18 144	7 253	**25 397**
1991 preliminary	17 180	6 544	**23 724**

Source: FISHERIES OF THE UNITED STATES, 1990, National Marine Fishing Service, U.S. Department of Commerce, May 1990.

TABLE 9: U.S. inventory and price of frozen giant scallops (20-30/lb) ont the Eastern U.S. market, February 1989 - January 1992.

Year	Price of giant scallops (US$/lb)*	US inventory (tons)**
1989		
jan.	----	2110
feb.	5.45	1800
march	4.85	1610
april	4.50	1560
may	4.70	1448
june	4.70	1512
july	4.50	1717
august	4.80	1914
sept.	4.80	1635
oct.	4.70	1599
nov.	4.60	1605
dec.	4.60	1547
1990		
jan.	5.20	1165
feb.	5.20	1079
march	5.20	893
april	5.00	953
may	5.00	1463
june	4.80	1650
july	4.80	1886
august	4.75	1712

Year	Price of giant scallops (US$/lb)*	US inventory (tons) **
july	4.80	1886
august	4.75	1712
sept.	4.75	1818
oct.	4.90	1715
nov.	5.00	1534
dec.	5.00	1436
1991		
jan.	5.05	1781
feb.	5.05	1725
march	4.95	1544
april	4.95	1672
may	4.80	1754
june	4.80	2000
july	4.80	2064
august	4.80	1923
sept.	4.80	1731
oct.	5.05	1567
nov.	5.05	1314
dec.	5.05	1083
1992		
jan.	5.15	867

Sources: * Seafood Price-Current, Urner Barry Publications

** National Marine Fisheries Service, Urner Barry Publications

TABLE 10: Average annual price of frozen giant scallops, 30-40/lb and 20-30/lb formats, on the Eastern US market, 1985-1991.

	1985	1986	1987	1988	1989	1990	1991
30-40/lb US$/lb	5,11	5,79	5,35	4.77	4,40	4,71	4,78
20-30/lb US$/lb	---	---	---	---	4,75	4,97	4,93

Source: Seafood Price-Current, Urner Barry Publications

TABLE 11: Average annual price of frozen scallops with roe, 8-12/lb, imported from the United Kingdom, on the Belgian market, 1988-1991.

	1988	1989	1990	1991
8-12/lb (Brithish pound/kg)	7,30	7,62	7,75	7,73

Source: European Fish Price Report, Globefish, Food and Agriculture Organization, United Nations.

D I V I S I O N D E S S E R V I C E S
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E C O N O M I C S E R V I C E S
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Ministère des Pêches et des Océans - Région du Québec
Department of Fisheries and Oceans - Quebec Region

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